



Lea Garrity, Enrolled Agent

Taxes - Representation - Payroll - Bookkeeping

(707) 693-1040 (866) 519-0108

office fax

Email: Lea@taxmermaid.com

An extension of time to file is available. Clients submitting information after March 15, 2024 may need to be placed on extension at the discretion of the tax professional. **Please note that an extension of time to file is not an extension of time to pay. We recommend that you make estimated payments to cover possible tax liability.** Penalties and interest may be assessed by the taxing authorities for failure to pay tax due on time. Our office is not liable for penalties and interest resulting from inadequate withholding or estimated payments. We can assist you with this.

Fees

Fees for services paid are for the preparation of the tax return only and does not include audit representation after the return is completed. If you seek representation before any tax agency, a separate agreement and fee will be quoted unless you choose to upgrade your NAP to the Gold Level at which time a different quote will be provided reflecting the credit due to you.

For new clients, we will give a good faith quote before work is started; with the understanding that the fee is contingent on the necessary forms required to file a proper tax return. Fees are due at the time of a completed return. Additional fees will be charged for bookkeeping, missed appointments, time spent and storage of documents.

Sign below for engagement of tax preparation:

Taxpayer

Date

Spouse

Date

Notice Assurance Program

Due to the aggressive nature of the current IRS and state policies, all individual tax clients will be automatically enrolled in our Notice Assurance Program at the Bronze Level. The fee adds \$45 to your tax preparation fee, before discounts. You may choose to opt out of this program by checking next to the statement below. Clients who opt out will be charged full rates for any representation services and off-season requests such as IRS notices/letters, tax planning and/or third-party refinance packages.

Please ask for a pamphlet if you'd like to see the different levels.

_____ ***I (We) choose to OPT OUT of the Notice Assurance Program

Knowledge & Integrity with Every Action

500 North Adams St., Suite A • Dixon, CA 95620 • www.TaxMermaid.com